

1. User Bar

Your Name PC Extn: 1055 IP: 108.66.220.163 Help

User Status – Set your status to let your team know if you're available

- Ready
- Busy

Log Out

On Break

- Coffee
- Lunch
- Personal Call
- QA Session
- Work Meeting

Minimize App to Menu bar

Switch Modes to Toolbar Version

Help Link takes you to the Contivio help center

PC Extn is your direct extension for other agents to dial you.

IP is your IP address

Busy & On Break – No inbound media sent to user

Custom Work Break Statuses Configured by Administrators in the Admin Portal

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2. Supervisor Bar

Stop Monitoring – For Supervisors to stop monitoring a live call

Supervisor Whisper – For Supervisors to Coach users

Supervisor Barge-In – Interrupt a call

Start Recording – Manually record a call

Stop Recording – Manually stop recording a call

Wrap Up – Extend your wrap-up period to finish notes

Identity – Set your outbound caller ID

Category – Set your primary queue or campaign

Play Audio – Insert an audio recording into call

Work Status – Live contact center statistics by Agent, Queue, and Campaign

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3. Telephony Bar

8002828105

Call Answer – Accept call

Call Hold – Place call on hold or park for another Queue via transfer

Call Conference – Add up to 5 additional participants to the call

Call Transfer – Warm or cold transfer of a call to a Queue or User

- Warm Transfer: place call on hold, contact 3rd party, connect/transfer call, make introductions
- Cold Transfer: dial extension/number, connect/transfer call automatically to 3rd party

Call Hang Up – End call

Voicemail – Listen to voice messages (X:Y) – unheard : saved

Telephony Keypad Mouse click number to dial or use number pad on keyboard. The keypad is good to use for extensions.

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4

6. Directory List (Phone Book)

Singapore mem... Queue

South America ..

Status

- Peter Youssef (1015) Users/Agents
- Tabaiha Brymer (1213) Transfer
- James Astwood (1060) Call Monitor

New Zealand me..

West Coast me..

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Irvine Sales (1002)

JCurve (1042)

Miami Services (1004)

Nancy Queue (1057)

Inside Sales

Kent Michaels (1010)

Incoming voice call: 7149045440 (West Coast General)

Accept Decline

5

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5. Media Notification Pop Up

Media Notification Pop Up – Click Accept to accept the call or media, click Decline to decline the call or media.

Settings can be adjusted under "Settings" tab.

4. Media Display Window

3476454555 Sales 00:00:30

Sales Caller ID Queue Call Duration/Timer

3476454555

Media Type Outbound Hold End Call or Media

Inbound Message

7. Contact Center Side Bar

Call Information Dismiss

Caller/Message ID

Disposition On Hold

Notes from transferred call...

Notes

User comments to push to CRM

After you click on the dismiss button, your notes and disposition will be stored in the company's CRM or database.

Search Customer ID Search

Contivio U.. ID 3476454555

- 23/3/2018 23:33:44 - Siddharth Chatterji
- 23/3/2018 23:33:25 (Sales) - Valerie Stokes
- 22/3/2018 19:42:35 (Sales) - Valerie Stokes
- 22/3/2018 16:32:15 (Sales) - Siddharth Chatterji
- 22/3/2018 16:31:57 (Sales) - Valerie Stokes

From Left to Right

Inbound Outbound Media SMS Contact ID (# or Email) Date & Time

Missed Voice Chat Email

Recent & Scheduled Calls

Recent Calls Scheduled Calls

- Valerie Stokes 26 Mar 2018 15:25:28
- 9179338644 26 Mar 2018 14:01:57
- 7345127780 26 Mar 2018 6:46:56

From Left to Right

Inbound Outbound Media SMS Contact ID (# or Email) Date & Time

Missed Voice Chat Email

Chat Chat messaging portal

Valerie... 00:00:23 Contact and Duration

Canned Answers

Transfer Valerie Stokes 15:24:56

Hi I have a question about pricing.

Valerie 15:25:44

Sure, happy to help. Have you checking out our pricing page on our website?

Chat message log

Chat message reply box

Messages Compose, Send & Track

Instant SMS Fax Email

Send Message Drop down list of users to message

Message/Reply box to one or Multiple Users

Received: Thu Feb 27 21:41:53 GMT 2014

From: Tabaiha Brymer

From Left to Right

Media Inbound Date/time Outbound Indicator Stamp

Scripts User/Agent Questionnaire

Script Name Sales Script

Thanks for calling. Would you like to place a new order or discuss an existing order?

Existing Order

Notes

Done Next

Call Scripts

A predefined, question tree with drop down options and dependent results

Questions List

Thanks for calling. Would you like to place a new order or discuss an existing order?

Our pricing model is quite sim... Have a nice day. Hi this is <name> with custom... What is the nature of your cal...

Personal Voicemails Refresh

- 10011035 - 14:26:22 08 Mar 2018
- 10011035 - 15:29:07 06 Mar 2018
- 10011035 - 15:28:20 06 Mar 2018

From Left to Right

Unheard Number or Extension (E.g., Queue ID + Extension) Date/time Stamp

Saved

Work Assignment Active Queues

Activity	CRM Profile	POP
East Coast G..	MSAccount...	✗
East Coast S..	DynmamicS..	✗
East Coast S..	MS2013_Lea..	✗
Contivio Acc..	SF_Record...	✓
Sacramento G..	SF Demo Ac..	✓
Sacramento S..	SF Chat	✗
Sacramento S..	SF Email P..	✓
Sacramento S..	DFAccountC..	✗
Sacramento S..		
Sacramento S..		
Sacramento S..		
Sacramento S..	AccountID	✗
Sales Campa...	SF CLI	✓

From Left to Right

Assigned Queue Media Screen Pop Assigned Screen Pop